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NATIONAL RESTAURANT ASSOCIATION

RESTAURANT USAGE OF ADVERTISING 1987

National Restaurant Association
Research and Information Services Department
1200 Seventeenth Street, N.W.
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INTRODUCTION

The National Restaurant Association commissioned the Gallup Organization to survey restaurant managers about their use of advertising. The objectives of the study were to determine:

- The types of advertising used in 1987 along with the frequency of use;
- Forms of direct mail used;
- Sources of mailing lists; and
- What change, if any, was expected in budgets for advertising and promotions in 1988.

This report presents the results of telephone interviews with 509 restaurants that qualified for inclusion by fulfilling the following criteria:

- More than 100 transactions on an average day.
- Brand purchase decisions made either at the restaurant or on the local level (i.e., within the same area code).

Interviews were conducted with the restaurant manager, unless he or she indicated that brand decisions were made at a higher level in the organization. In the latter case, interviewers were instructed to attempt to interview the person who made these decisions, provided that person was located within the boundaries of the same area code as the originally selected restaurant.

Interviews were conducted during the period of September 21 through October 16, 1987 by the Gallup Organization.

SECTION I:

TYPES OF ADVERTISING USED

TYPES OF ADVERTISING USED

In a National Restaurant Association Gallup survey, managers from various types of restaurants were asked what forms of advertising or promotions they employed and to what extent.

Seventy percent of the managers polled used newspapers to promote their establishment, and nearly 30 percent did so on a regular basis, making this communications medium the most popular form of restaurant advertising. The next most popular form of restaurant advertising in 1987 was the sponsorship of a community event: Just less than 60 percent of the survey respondents promoted their operations in this manner. Eighteen percent sponsored community events regularly.

The next most popular forms of restaurant advertising were sponsorship of a team, radio ads and handouts and fliers. Forty-eight percent of all restaurants surveyed sponsored a team in the past year. Radio advertising and the use of handouts or fliers followed closely behind. Sponsorships of teams and community events had the same percentage of regular users; community event sponsorship, however, drew a greater percentage of occasional users.

The least-used form of advertising was television. Magazine advertising and direct mail, which includes mailings of coupons, newsletters and mini-menus, were also less popular forms of advertising. Less than 25 percent of the managers polled reported having used these methods.

Billboard or outdoor advertising was the only reported promotional method that has similar percentages of regular and occasional users. Overall, 28 percent of the respondents made use of outdoor advertising.

Certain types of establishments tend to employ certain types of advertising. Generally, average per-person check size, daily customer count, structure of ownership and type of restaurant are related to the types of advertising used regularly. Newspaper advertising, for example, tends to be used more often by chains, non fast food operations, especially fine dining restaurants, and restaurants with higher daily customer counts. Also, dining establishments with average per-person checks of more than $8 are more likely to use newspapers regularly than are other types of restaurants. Still, it is important to note that newspaper advertising ranks first among all types of restaurants.

Among regular users of sponsorships, whether of teams or of community events, no particular differentiation by restaurant type is apparent. Operations with higher daily customer counts, however, tend to sponsor community events to a greater degree than do those with lower traffic volumes. In addition, independents are more likely than chains to sponsor teams, possibly reflecting the closer ties these operations have to their communities. Handouts, direct

Use of Advertising in 1987 Among All Restaurant Managers

Types of Advertising	Total Used %	Used Regularly %	Used Occasionally %	Not At All %	Don't Know %
Newspaper	70	29	41	29	1
Sponsorship of a community event	59	18	41	40	1
Sponsorship of a Team	48	18	30	51	1
Radio	43	14	29	56	1
Handouts or fliers	42	15	27	57	1
Restaurant guide	33	11	22	65	2
Billboard/Outdoor advertising	28	15	13	71	1
Direct Mail	24	8	16	75	1
Magazine	21	4	17	78	1
Television	16	5	11	83	1

mail, radio and television ads are used most by chains and fast food restaurants on a regular basis. In fact, the percentage of chains regularly using radio advertising was three times that for independents. The proportion of chains using direct mail regularly was nearly 20 percent, compared to 5 percent for independents, and television was used by 18 percent of chain operations versus 2 percent of the independents.

In contrast, restaurant guides and magazine advertising are more likely to be used on a regular basis by independents, non-fast food establishments and higher check establishments. Among the fine dining restaurants polled, restaurant guides were the second most regularly used promotional vehicle. The percentage of fine dining operations that were regular advertisers in magazines was three times the average for all restaurants. This pattern is also seen in the percentage of higher versus lower-check restaurants that use magazines to promote their establishments: Just 2 percent of the restaurants with average per person checks of under $5 used magazine ads compared to 10 percent of eating places with a per person check size of $8 or more.

Types of Advertising Used Regularly in 1987

	Newspaper %	Sponsor of Comm. Event %	Sponsor of A Team %	Hand-outs/ Flyers %	Out-door Adv. %	Radio %	Rest. Guide %	Direct Mail %	TV %	Maga-zine %
All Restaurant Managers	29	18	18	15	15	14	11	8	5	4
Average Daily Customer Count										
Under 200	24	13	15	12	12	9	10	5	1	4
200 - 399	31	20	18	17	19	18	12	11	7	4
400 or more	41	27	24	19	14	21	14	9	11	1
Average Cost Per Person Per Evening Meal										
Under $5.00	26	21	18	18	18	18	5	7	7	2
$5.00 - $7.99	30	15	20	13	20	15	11	9	7	3
$8.00 or more	43	21	21	13	14	14	21	9	6	10
Average Yearly Food Purchase										
Under $50,000	21	16	15	16	15	8	5	5	4	2
$50,000 - $99,999	32	19	21	16	14	18	10	11	3	3
$100,000 & over	37	20	21	14	18	14	19	10	7	6
Restaurant Ownership										
Chain/Franchised independent	44	19	13	28	24	31	8	19	18	2
Independent	25	17	19	11	13	10	13	5	2	5
Type of Menu										
Limited	22	16	17	20	9	14	6	12	6	4
Full	33	18	18	12	17	15	14	6	5	5
Type of Restaurant										
Fast food	22	15	16	22	14	19	4	13	8	2
Non-fast food	32	19	19	11	16	12	14	6	4	5
Type of Non-Fast Food Restaurant										
Fine dining	45	22	22	11	16	8	27	8	0	12
Family	31	19	20	10	15	16	12	6	5	4
All others	23	12	11	16	16	5	7	7	5	0

SECTION II:

DIRECT MAIL

DIRECT MAIL

Only one-quarter of the restaurateurs polled said they used direct mail to promote their establishments in 1987. One-third as many restaurateurs used direct mail as advertised in newspapers, less than one-half as many used direct mail as sponsored community events and just slightly more than one-half as many used direct mail as distributed handouts or fliers.

The restaurants most likely to use direct mail are chains or franchised independents, fast food operations and establishments with high daily customer counts. In fact, nearly half of the chain/franchised independent restaurants polled used direct mail, 19 percent of them on a regular basis. And 31 percent of the restaurants describing themselves as fast feeders employed direct mail techniques, 13 percent on a regular basis.

In contrast, the least likely users of direct mail are independents, non-fast food restaurants and operations with low daily customer counts. Only 18 percent of independents used direct mail, and just 5 percent did so on regular basis.

Because direct mail advertising is possible in a variety of forms, operators have a variety of options to choose from. But by far, the most popular form of direct mail in current use is the mailing of coupons or discounts. Almost two-thirds of the direct mail users distributed coupons or discounts. This percentage is markedly higher at chain restaurants and fast food places. For example, among direct mail users, 84 percent of the fast food places surveyed offered coupons through direct mail, compared to 53 percent of the non-fast food feeders. Coupon usage was just as high at chain restaurants; 85 percent made use of this direct mail method. In contrast, only slightly more than half of the independent establishments mailed coupons.

The next three most popular forms of direct mail were value packs (a collection of coupons from different sources), mini-menus and calendars of events or specials. These three types of direct mail lag far behind coupons in popularity; value packs, for example, were used by only 20 percent of all the direct mail users polled. Value packs, also called co-ops, are used mostly by the same types of restaurants that direct mail their own coupons: chains, limited menu establishments and eateries with high daily customer counts. While 33 percent of the chain restaurants mailed co-ops, only 11 percent of the independent operations utilized this form of advertising.

In contrast, mini-menus and calendars are more the domain of fullservice, non-fast food establishments. Twenty percent of the fullservice restaurants that employed direct mail advertising did so in the form of mini-menus, compared to 5 percent of the limited menu operations. Independent restaurants also made use of mini-menus:

Types of Direct Mail Used
by Restaurants
- 1987 -

Format of Direct Mail	Percent of Managers Using Direct Mail Format* %
Coupon or discount	64
Co-op or value pack	20
Mini-menu	15
Calendar of events or specials	14
Giveaway	11
Letter	9
Invitation	9
Newsletter	7
Postcard	1
Other	5
Don't Know	2

* Of all restaurant managers who use direct mail.

21 percent distributed sample menus through direct mail, compared to only 6 percent of the chains.

Fullservice and independent restaurants also tend to send letters, invitations and newsletters more often than do limited menu or chain operations. Giveaways, however, have a following in both the fast food and non-fast food segments.

There is a correlation between meal cost at individual restaurants and the direct mail approach employed by them. Restaurants with an average evening meal check size of under $5 were more likely to use coupons than those establishments with average check sizes of $8 or more, by a margin of 81 to 51 percent. The high check restaurants, in turn, were more likely to direct mail mini-menus, calendars, letters and invitations than their less expensive counterparts. This pattern is also observable in the direct mail approaches taken by different types of non-fast food operations. While half of the steakhouses and 65 percent of the family-style restaurants polled distributed coupons, less than 40 percent of the fine-dining establishments did so. In contrast, fine dining places were much more likely to mail letters, invitations or newsletters.

Restaurants using direct mail were also asked the source of their mailing lists. Current patrons and purchased lists are about equally likely to have been a direct mailing list source. Close to one in three managers said they have used these sources for a mailing list. Other sources for direct mailing lists were mentioned by 31 percent of the managers. Of these respondents, no particular source was used by more than 3 percent.

Mailing List Source Used by Restaurants*
- 1987 -

Mailing List Source	Yes %	No %	Don't Know %	Total %
Current Patrons	32	41	27	100
Purchased List	29	46	25	100
Any other source	31	37	32	100

* Of all restaurant managers who use direct mail.

SECTION III:

ADVERTISING BUDGETS

ADVERTISING BUDGETS

Approximately one quarter of all restaurants polled expected to increase their advertising and promotion budget in 1988, with more than 12 percent planning a spending increase of 6 percent or more.

Tempering this increase, the majority of establishments, 58 percent, planned no change in their advertising and promotion budget. Still, by a margin of 25 to 4 percent, more restaurants expected budget increases than decreases.

The restaurants that planned to expand their advertising and promotional budgets tended to be chains, fast food places and establishments with high average daily customer counts - the same types of restaurants that are most likely to advertise in the first place. More than 40 percent of the chain/franchised independent restaurants planned advertising budget increases for 1988, compared to only 21 percent of the independents. Independent restaurants were also more likely than chains to hold their budgets steady, by a margin of 63 to 41 percent.

Change in Advertising/Promotion Budgets for 1988

Expected Change in Advertising/ Promotion Budget For 1988	All Rest. Mgrs. %	Restaurant Ownership	
		Chain/ Franchised Independent %	Independent %
Increase up to 5 percent	13	20	11
Increase 6 to 10 percent	7	13	5
Increase more than 10 percent	5	8	5
Decrease up to 5 percent	2	1	2
Decrease more than 5 percent	2	0	3
No change/Stay the same	58	41	63
Don't Know	13	17	11
Total	100	100	100

DETAILED TABLES

Q.1 FOR EACH OF THE FOLLOWING (*) TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
(*) A. RADIO.
BASED ON TOTAL.

		WEEKDAY MEALS OPEN					AVERAGE DAILY CUSTOMER COUNT			AVERAGE COST PER PERSON PER EVENING MEAL			AVERAGE YEARLY FOOD PURCHASE		
	TOTAL	1 OR 2 MEALS	ALL MEALS	BREAK-FAST	LUNCH	DINNER	UNDER 200	200-399	400 OR MORE	UNDER $5.00	$5.00-$7.99	$8.00 OR MORE	UNDER $50K	$50K-$99.9K	$100K AND OVER
TOTAL RESPONDENTS	509	339	170	218	481	448	186	216	70	137	149	140	80	136	173
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED_TYPE															
REGULARLY	73	44	29	30	72	70	17	39	15	25	23	19	6	25	25
	14.3	13.0	17.1	13.8	15.0	15.6	9.1	18.1	21.4	18.2	15.4	13.6	7.5	18.4	14.5
OCCASIONALLY	148	94	54	60	137	141	49	72	15	42	50	46	21	43	57
	29.1	27.7	31.8	27.5	28.5	31.5	26.3	33.3	21.4	30.7	33.6	32.9	26.3	31.6	32.9
NOT AT ALL	284	198	86	126	268	234	117	105	39	69	74	75	52	66	90
	55.8	58.4	50.6	57.8	55.7	52.2	62.9	48.6	55.7	50.4	49.7	53.6	65.0	48.5	52.0
DON'T KNOW	4	3	1	2	4	3	3	-	1	1	2	-	1	2	1
	0.8	0.9	0.6	0.9	0.8	0.7	1.6	-	1.4	0.7	1.3	-	1.3	1.5	0.6

THE GALLUP ORGANIZATION, INC.
PRINCETON, NEW JERSEY

RESTAURANT OMNIBUS
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OCTOBER, 1987
GO 87264

Q.1 FOR EACH OF THE FOLLOWING (#) TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
(#) A. RADIO.
BASED ON TOTAL.

		RESTAURANT OWNERSHIP		TYPE OF MENU		TYPE OF RESTAURANT		DESCRIPTION OF NON-FAST FOOD RESTAURANT						
	TOTAL	CHAIN/ FRANCHISED INDEPEND.	INDEPENDENT	LIMITED	FULL	FAST FOOD	NON-FAST FOOD	FINE DINING	FAMILY	CAFETERIA	COFFEE SHOP/ LUNCHEONETTE	DINER	STEAK HOUSE	OTHER
TOTAL RESPONDENTS	509	105	398	163	344	147	359	73	229	9	15	16	4	12
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED_TYPE														
REGULARLY	73	33	40	22	51	28	45	6	36	2	1	-	-	-
	14.3	31.4	10.1	13.5	14.8	19.0	12.5	8.2	15.7	22.2	6.7	-	-	-
OCCASIONALLY	148	32	115	40	107	36	110	27	72	2	3	1	3	2
	29.1	30.5	28.9	24.5	31.1	24.5	30.6	37.0	31.4	22.2	20.0	6.3	75.0	16.7
NOT AT ALL	284	40	239	99	184	82	201	40	119	5	10	15	1	10
	55.8	38.1	60.1	60.7	53.5	55.8	56.0	54.8	52.0	55.6	66.7	93.8	25.0	83.3
DON'T KNOW	4	-	4	2	2	1	3	-	2	-	1	-	-	-
	0.8	-	1.0	1.2	0.6	0.7	0.8	-	0.9	-	6.7	-	-	-

Q.1 FOR EACH OF THE FOLLOWING TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
EG: A. NEWSPAPER.
BASED ON TOTAL.

		WEEKDAY MEALS OPEN					AVERAGE DAILY CUSTOMER COUNT			AVERAGE COST PER PERSON PER EVENING MEAL			AVERAGE YEARLY FOOD PURCHASE		
	TOTAL	1 OR 2 MEALS	ALL MEALS	BREAK-FAST	LUNCH	DINNER	UNDER 200	200-399	400 OR MORE	UNDER $5.00	$5.00-$7.99	$8.00 OR MORE	UNDER $50K	$50K-$99.9K	$100K AND OVER
TOTAL RESPONDENTS	509	339	170	218	481	448	186	216	70	137	149	140	80	136	173
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED_TYPE															
REGULARLY	149	97	52	57	138	144	45	67	29	35	45	60	17	44	64
	29.3	28.6	30.6	26.1	28.7	32.1	24.2	31.0	41.4	25.5	30.2	42.9	21.3	32.4	37.0
OCCASIONALLY	207	138	69	85	200	186	78	92	20	62	71	46	36	58	62
	40.7	40.7	40.6	39.0	41.6	41.5	41.9	42.6	28.6	45.3	47.7	32.9	45.0	42.6	35.8
NOT AT ALL	150	102	48	74	140	116	62	56	20	40	32	33	26	33	46
	29.5	30.1	28.2	33.9	29.1	25.9	33.3	25.9	28.6	29.2	21.5	23.6	32.5	24.3	26.6
DON'T KNOW	3	2	1	2	3	2	1	1	1	-	1	1	1	1	1
	0.6	0.5	0.6	0.9	0.6	0.4	0.5	0.5	1.4	-	0.7	0.7	1.3	0.7	0.6

Q.1 FOR EACH OF THE FOLLOWING (#) TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
(#) B. NEWSPAPER.
BASED ON TOTAL.

		RESTAURANT OWNERSHIP		TYPE OF MENU		TYPE OF RESTAURANT		DESCRIPTION OF NON-FAST FOOD RESTAURANT						
	TOTAL	CHAIN/ FRANCHISED INDEPEND.	INDEPENDENT	LIMITED	FULL	FAST FOOD	NON-FAST FOOD	FINE DINING	FAMILY	CAFETERIA	COFFEE SHOP/ LUNCHEONETTE	DINER	STEAK HOUSE	OTHER
TOTAL RESPONDENTS	509	105	398	163	344	147	359	73	229	9	15	16	4	12
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED_TYPE														
REGULARLY	149	46	101	35	114	32	116	33	70	3	4	2	2	2
	29.3	43.8	25.4	21.5	33.1	21.8	32.3	45.2	30.6	33.3	26.7	12.5	50.0	16.7
OCCASIONALLY	207	36	170	69	137	64	141	26	95	3	4	6	1	5
	40.7	34.3	42.7	42.3	39.8	43.5	39.3	35.6	41.5	33.3	26.7	37.5	25.0	41.7
NOT AT ALL	150	23	124	58	91	51	99	14	62	3	6	8	1	5
	29.5	21.9	31.2	35.6	26.5	34.7	27.6	19.2	27.1	33.3	40.0	50.0	25.0	41.7
DON'T KNOW	3	-	3	1	2	-	3	-	2	-	1	-	-	-
	0.6	-	0.8	0.6	0.6	-	0.8	-	0.9	-	6.7	-	-	-

Q.1 FOR EACH OF THE FOLLOWING (10) TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
(3) C. TV.
BASED ON TOTAL.

		WEEKDAY MEALS OPEN					AVERAGE DAILY CUSTOMER COUNT			AVERAGE COST PER PERSON PER EVENING MEAL			AVERAGE YEARLY FOOD PURCHASE		
	TOTAL	1 OR 2 MEALS	ALL MEALS	BREAK-FAST	LUNCH	DINNER	UNDER 200	200-399	400 OR MORE	UNDER $5.00	$5.00-$7.99	$8.00 OR MORE	UNDER $50K	$50K-$99.9K	$100K AND OVER
TOTAL RESPONDENTS	509	339	170	218	481	449	186	216	70	137	149	140	80	136	173
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED_TYPE															
REGULARLY	27	18	9	9	26	27	2	16	8	9	10	8	3	11	12
	5.3	5.3	5.1	4.1	5.4	6.0	1.1	7.4	11.4	6.6	6.7	5.7	3.8	8.1	6.9
OCCASIONALLY	58	40	18	18	57	57	19	29	5	17	21	17	8	11	23
	11.4	11.8	10.6	8.3	11.9	12.7	10.2	13.4	7.1	12.4	14.1	12.1	10.0	8.1	13.3
NOT AT ALL	420	278	142	189	394	361	163	170	56	110	116	115	68	112	137
	82.5	82.0	83.5	86.7	81.9	80.6	87.6	78.7	80.0	80.3	77.9	82.1	85.0	82.4	79.2
DON'T KNOW	4	3	1	2	4	3	2	1	1	1	2	-	1	2	1
	0.8	0.9	0.6	0.9	0.8	0.7	1.1	0.5	1.4	0.7	1.3	-	1.3	1.5	0.6

Q.1 FOR EACH OF THE FOLLOWING (#) TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
(#) C. TV.
BASED ON TOTAL.

		RESTAURANT OWNERSHIP		TYPE OF MENU		TYPE OF RESTAURANT		DESCRIPTION OF NON-FAST FOOD RESTAURANT						
	TOTAL	CHAIN/ FRANCHISED INDEPEND.	INDEPENDENT	LIMITED	FULL	FAST FOOD	NON-FAST FOOD	FINE DINING	FAMILY	CAFETERIA	COFFEE SHOP/ LUNCHEONETTE	DINER	STEAK HOUSE	OTHER
TOTAL RESPONDENTS	509	105	398	163	344	147	359	73	229	9	15	16	4	12
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED_TYPE														
REGULARLY	27	19	9	9	18	12	15	-	12	-	1	1	1	-
	5.3	18.1	2.0	5.5	5.2	8.2	4.2	-	5.2	-	6.7	6.3	25.0	-
OCCASIONALLY	58	28	30	23	35	23	34	7	25	2	-	-	-	-
	11.4	26.7	7.5	14.1	10.2	15.6	9.5	9.6	10.9	22.2	-	-	-	-
NOT AT ALL	420	58	356	129	289	112	306	66	189	7	13	15	3	12
	82.5	55.2	89.4	79.1	84.0	76.2	95.2	90.4	82.5	77.8	86.7	93.8	75.0	100.0
DON'T KNOW	4	-	4	2	2	-	4	-	3	-	1	-	-	-
	0.8	-	1.0	1.2	0.6	-	1.1	-	1.3	-	6.7	-	-	-

Q.1 FOR EACH OF THE FOLLOWING (#) TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
(#) D. RESTAURANT GUIDE.
BASED ON TOTAL.

		WEEKDAY MEALS OPEN					AVERAGE DAILY CUSTOMER COUNT			AVERAGE COST PER PERSON PER EVENING MEAL			AVERAGE YEARLY FOOD PURCHASE		
	TOTAL	1 OR 2 MEALS	ALL MEALS	BREAK-FAST	LUNCH	DINNER	UNDER 200	200-399	400 OR MORE	UNDER $5.00	$5.00-$7.99	$8.00 OR MORE	UNDER $50K	$50K-$99.9K	$100K AND OVER
TOTAL RESPONDENTS	509	339	170	218	481	448	186	216	70	137	149	140	80	136	173
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED_TYPE															
REGULARLY	58	38	20	23	53	54	19	27	10	7	16	30	4	14	33
	11.4	11.2	11.8	10.6	11.0	12.1	10.2	12.5	14.3	5.1	10.7	21.4	5.0	10.3	19.1
OCCASIONALLY	111	82	29	35	108	101	30	55	18	21	39	39	13	29	46
	21.8	24.2	17.1	16.1	22.5	22.5	16.1	25.5	25.7	15.3	26.2	27.9	16.3	21.3	26.6
NOT AT ALL	333	215	118	156	313	287	132	133	41	107	91	70	62	90	93
	65.4	63.4	69.4	71.6	65.1	64.1	71.0	61.6	58.6	78.1	61.1	50.0	77.5	66.2	53.8
DON'T KNOW	7	4	3	4	7	6	5	1	1	2	3	1	1	3	1
	1.4	1.2	1.8	1.8	1.5	1.3	2.7	0.5	1.4	1.5	2.0	0.7	1.3	2.2	0.6

THE GALLUP ORGANIZATION, INC.
PRINCETON, NEW JERSEY

RESTAURANT OMNIBUS
NRA

OCTOBER, 1987
GO 87264

Q.1 FOR EACH OF THE FOLLOWING (9) TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
(9) D. RESTAURANT GUIDE.
BASED ON TOTAL.

		RESTAURANT OWNERSHIP		TYPE OF MENU		TYPE OF RESTAURANT		DESCRIPTION OF NON-FAST FOOD RESTAURANT						
	TOTAL	CHAIN/ FRANCHISED INDEPEND.	INDEPENDENT	LIMITED	FULL	FAST FOOD	NON-FAST FOOD	FINE DINING	FAMILY	CAFETERIA	COFFEE SHOP/ LUNCHEONETTE	DINER	STEAK HOUSE	OTHER
TOTAL RESPONDENTS	509	105	398	163	344	147	359	73	229	9	15	16	4	12
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED_TYPE														
REGULARLY	58	8	50	9	49	6	51	20	27	1	1	1	1	-
	11.4	7.6	12.6	5.5	14.2	4.1	14.2	27.4	11.8	11.1	6.7	6.3	25.0	-
OCCASIONALLY	111	30	79	32	78	27	83	21	52	3	2	1	1	3
	21.8	28.6	19.8	19.6	22.7	18.4	23.1	28.8	22.7	33.3	13.3	6.3	25.0	25.0
NOT AT ALL	333	65	264	120	212	113	219	32	145	5	11	14	2	9
	65.4	61.9	66.3	73.6	61.6	76.9	61.0	43.8	63.3	55.6	73.3	87.5	50.0	75.0
DON'T KNOW	7	2	5	2	5	1	6	-	5	-	1	-	-	-
	1.4	1.9	1.3	1.2	1.5	0.7	1.7	-	2.2	-	6.7	-	-	-

Q.1 FOR EACH OF THE FOLLOWING (#) TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
(*) F. MAGAZINE.
BASED ON TOTAL.

		WEEKDAY MEALS OPEN					AVERAGE DAILY CUSTOMER COUNT			AVERAGE COST PER PERSON PER EVENING MEAL			AVERAGE YEARLY FOOD PURCHASE		
	TOTAL	1 OR 2 MEALS	ALL MEALS	BREAK-FAST	LUNCH	DINNER	UNDER 200	200-399	400 OR MORE	UNDER $5.00	$5.00-$7.99	$8.00 OR MORE	UNDER $50K	$50K-$99.9K	$100K AND OVER
TOTAL RESPONDENTS	509	339	170	218	481	448	186	216	70	137	149	140	80	136	173
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED_TYPE															
REGULARLY	22	14	8	9	21	21	8	9	1	3	4	14	2	4	11
	4.3	4.1	4.7	4.1	4.4	4.7	4.3	4.2	1.4	2.2	2.7	10.0	2.5	2.9	6.4
OCCASIONALLY	84	58	26	29	78	81	31	30	19	14	30	35	9	23	36
	16.5	17.1	15.3	13.3	16.2	18.1	16.7	13.9	27.1	10.2	20.1	25.0	11.3	16.9	20.8
NOT AT ALL	397	263	134	177	376	341	144	175	49	119	113	89	68	108	124
	78.0	77.6	78.8	91.2	78.2	76.1	77.4	81.0	70.0	86.9	75.8	63.6	85.0	79.4	71.7
DON'T KNOW	6	4	2	3	6	5	3	2	1	1	2	2	1	1	2
	1.2	1.2	1.2	1.4	1.2	1.1	1.6	0.9	1.4	0.7	1.3	1.4	1.3	0.7	1.2

Q.1 FOR EACH OF THE FOLLOWING (#) TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
(#) F. MAGAZINE.
BASED ON TOTAL.

		RESTAURANT OWNERSHIP		TYPE OF MENU		TYPE OF RESTAURANT		DESCRIPTION OF NON-FAST FOOD RESTAURANT						
	TOTAL	CHAIN/ FRANCHISED INDEPEND.	INDEPENDENT	LIMITED	FULL	FAST FOOD	NON-FAST FOOD	FINE DINING	FAMILY	CAFETERIA	COFFEE SHOP/ LUNCHEONETTE	DINER	STEAK HOUSE	OTHER
TOTAL RESPONDENTS	509	105	398	163	344	147	359	73	229	9	15	16	4	12
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED_TYPE														
REGULARLY	22	2	20	6	16	3	18	9	9	-	-	-	-	-
	4.3	1.9	5.0	3.7	4.7	2.0	5.0	12.3	3.9	-	-	-	-	-
OCCASIONALLY	84	18	65	17	67	16	68	22	39	3	1	1	1	1
	16.5	17.1	16.3	10.4	19.5	10.9	18.9	30.1	17.0	33.3	6.7	6.3	25.0	8.3
NOT AT ALL	397	84	309	138	257	127	268	41	178	6	13	15	3	11
	78.0	80.0	77.4	84.7	74.7	86.4	74.7	56.2	77.7	66.7	86.7	93.8	75.0	91.7
DON'T KNOW	6	1	5	2	4	1	5	1	3	-	1	-	-	-
	1.2	1.0	1.3	1.2	1.2	0.7	1.4	1.4	1.3	-	6.7	-	-	-

Q.1 FOR EACH OF THE FOLLOWING (#) TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
(#) F. BILLBOARD OR OUTDOOR ADVERTISING.
BASED ON TOTAL.

		WEEKDAY MEALS OPEN					AVERAGE DAILY CUSTOMER COUNT			AVERAGE COST PER PERSON PER EVENING MEAL			AVERAGE YEARLY FOOD PURCHASE		
	TOTAL	1 OR 2 MEALS	ALL MEALS	BREAK-FAST	LUNCH	DINNER	UNDER 200	200-399	400 OR MORE	UNDER $5.00	$5.00-$7.99	$8.00 OR MORE	UNDER $50K	$50K-$99.9K	$100K AND OVER
TOTAL RESPONDENTS	509	339	170	218	481	448	186	216	70	137	149	140	80	136	173
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED_TYPE															
REGULARLY	76	44	32	35	71	74	23	41	10	24	29	20	12	19	31
	14.9	13.0	18.8	16.1	14.8	16.5	12.4	19.0	14.3	17.5	19.5	14.3	15.0	14.0	17.9
OCCASIONALLY	67	46	21	24	65	64	19	30	12	17	26	18	9	16	26
	13.2	13.6	12.4	11.0	13.5	14.3	10.2	13.9	17.1	12.4	17.4	12.9	11.3	11.8	15.0
NOT AT ALL	362	247	115	157	341	306	142	144	47	95	92	101	59	100	114
	71.1	72.9	67.6	72.0	70.9	68.3	76.3	66.7	67.1	69.3	61.7	72.1	73.8	73.5	65.9
DON'T KNOW	4	2	2	2	4	4	2	1	1	1	2	1	-	1	2
	0.8	0.6	1.2	0.9	0.8	0.9	1.1	0.5	1.4	0.7	1.3	0.7	-	0.7	1.2

Q.1 FOR EACH OF THE FOLLOWING (#) TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
(#) F. BILLBOARD OR OUTDOOR ADVERTISING.
BASED ON TOTAL.

		RESTAURANT OWNERSHIP		TYPE OF MENU		TYPE OF RESTAURANT		DESCRIPTION OF NON-FAST FOOD RESTAURANT						
	TOTAL	CHAIN/ FRANCHISED INDEPEND.	INDEPENDENT	LIMITED	FULL	FAST FOOD	NON-FAST FOOD	FINE DINING	FAMILY	CAFETERIA	COFFEE SHOP/ LUNCHEONETTE	DINER	STEAK HOUSE	OTHER
TOTAL RESPONDENTS	509	105	398	163	344	147	359	73	229	9	15	16	4	12
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED TYPE														
REGULARLY	76	25	51	15	60	20	56	12	35	3	2	2	1	1
	14.9	23.8	12.8	9.2	17.4	13.6	15.6	16.4	15.3	33.3	13.3	12.5	25.0	8.3
OCCASIONALLY	67	20	46	17	50	22	44	9	33	-	1	-	1	-
	13.2	19.0	11.6	10.4	14.5	15.0	12.3	12.3	14.4	-	6.7	-	25.0	-
NOT AT ALL	362	60	297	130	231	105	255	51	158	6	12	14	2	11
	71.1	57.1	74.6	79.8	67.2	71.4	71.0	69.9	69.0	66.7	80.0	87.5	50.0	91.7
DON'T KNOW	4	-	4	1	3	-	4	1	3	-	-	-	-	-
	0.8	-	1.0	0.6	0.9	-	1.1	1.4	1.3	-	-	-	-	-

THE GALLUP ORGANIZATION, INC.
PRINCETON, NEW JERSEY

RESTAURANT OMNIBUS
"NRA"

OCTOBER, 1987
GO 87264

Q.1 FOR EACH OF THE FOLLOWING [*] TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
[*] G. SPONSORSHIP OF A TEAM.
BASED ON TOTAL.

		WEEKDAY MEALS OPEN					AVERAGE DAILY CUSTOMER COUNT			AVERAGE COST PER PERSON PER EVENING MEAL			AVERAGE YEARLY FOOD PURCHASE		
	TOTAL	1 OR 2 MEALS	ALL MEALS	BREAK -FAST	LUNCH	DINNER	UNDER 200	200-399	400 OR MORE	UNDER $5.00	$5.00-$7.99	$8.00 OR MORE	UNDER $50K	$50K-$99.9K	$100K AND OVER
TOTAL RESPONDENTS	509	339	170	218	481	448	186	216	70	137	149	140	80	136	173
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED_TYPE															
REGULARLY	91	62	29	33	80	86	28	40	17	24	29	29	12	28	36
	17.9	18.3	17.1	15.1	16.6	19.2	15.1	18.5	24.3	17.5	19.5	20.7	15.0	20.6	20.8
OCCASIONALLY	154	100	54	65	152	141	54	65	22	50	51	36	24	40	55
	30.3	29.5	31.8	29.8	31.6	31.5	29.0	30.1	31.4	36.5	34.2	25.7	30.0	29.4	31.8
NOT AT ALL	258	173	85	117	243	216	102	108	30	63	66	73	43	66	79
	50.7	51.0	50.0	53.7	50.5	48.2	54.8	50.0	42.9	46.0	44.3	52.1	53.8	48.5	45.7
DON'T KNOW	6	4	2	3	6	5	2	3	1	-	3	2	1	2	3
	1.2	1.2	1.2	1.4	1.2	1.1	1.1	1.4	1.4	-	2.0	1.4	1.3	1.5	1.7

Q.1 FOR EACH OF THE FOLLOWING (#) TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
(#) G. SPONSORSHIP OF A TEAM.
BASED ON TOTAL.

		RESTAURANT OWNERSHIP		TYPE OF MENU		TYPE OF RESTAURANT		DESCRIPTION OF NON-FAST FOOD RESTAURANT						
	TOTAL	CHAIN/ FRANCHISED INDEPEND.	INDEPENDENT	LIMITED	FULL	FAST FOOD	NON-FAST FOOD	FINE DINING	FAMILY	CAFETERIA	COFFEE SHOP/ LUNCHEONETTE	DINER	STEAK HOUSE	OTHER
TOTAL RESPONDENTS	509	105	398	163	344	147	359	73	229	9	15	16	4	12
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED_TYPE														
REGULARLY	91	14	77	28	63	23	68	16	46	-	1	1	2	2
	17.9	13.3	19.3	17.2	18.3	15.6	18.9	21.9	20.1	-	6.7	6.3	50.0	16.7
OCCASIONALLY	154	37	117	48	106	43	111	21	78	3	2	3	-	3
	30.3	35.2	29.4	29.4	30.8	29.3	30.9	28.8	34.1	33.3	13.3	18.8	-	25.0
NOT AT ALL	258	53	199	85	171	81	174	35	101	6	11	12	2	7
	50.7	50.5	50.0	52.1	49.7	55.1	48.5	47.9	44.1	66.7	73.3	75.0	50.0	58.3
DON'T KNOW	6	1	5	2	4	-	6	1	4	-	1	-	-	-
	1.2	1.0	1.3	1.2	1.2	-	1.7	1.4	1.7	-	6.7	-	-	-

Q.1 FOR EACH OF THE FOLLOWING (*) TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
(*) H. SPONSORSHIP OF A COMMUNITY EVENT.
BASED ON TOTAL.

		WEEKDAY MEALS OPEN					AVERAGE DAILY CUSTOMER COUNT			AVERAGE COST PER PERSON PER EVENING MEAL			AVERAGE YEARLY FOOD PURCHASE		
	TOTAL	1 OR 2 MEALS	ALL MEALS	BREAK-FAST	LUNCH	DINNER	UNDER 200	200-399	400 OR MORE	UNDER $5.00	$5.00-$7.99	$8.00 OR MORE	UNDER $50K	$50K-$99.9K	$100K AND OVER
TOTAL RESPONDENTS	509	339	170	218	481	448	186	216	70	137	149	140	80	136	173
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED_TYPE															
REGULARLY	89	60	29	33	82	85	24	43	19	29	23	29	13	26	35
	17.5	17.7	17.1	15.1	17.0	19.0	12.9	19.9	27.1	21.2	15.4	20.7	16.3	19.1	20.2
OCCASIONALLY	210	137	73	89	202	188	71	92	27	59	71	54	32	65	70
	41.3	40.4	42.9	40.8	42.0	42.0	38.2	42.6	38.6	43.1	47.7	38.6	40.0	47.8	40.5
NOT AT ALL	205	138	67	94	192	171	89	79	23	49	53	55	34	43	66
	40.3	40.7	39.4	43.1	39.9	38.2	47.8	36.6	32.9	35.8	35.6	39.3	42.5	31.6	38.2
DON'T KNOW	5	4	1	2	5	4	2	2	1	-	2	2	1	2	2
	1.0	1.2	0.6	0.9	1.0	0.9	1.1	0.9	1.4	-	1.3	1.4	1.3	1.5	1.2

Q.1 FOR EACH OF THE FOLLOWING (9) TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
(9) H. SPONSORSHIP OF A COMMUNITY EVENT.
BASED ON TOTAL.

		RESTAURANT OWNERSHIP		TYPE OF MENU		TYPE OF RESTAURANT		DESCRIPTION OF NON-FAST FOOD RESTAURANT						
	TOTAL	CHAIN/ FRANCHISED INDEPEND.	INDEPENDENT	LIMITED	FULL	FAST FOOD	NON-FAST FOOD	FINE DINING	FAMILY	CAFETERIA	COFFEE SHOP/ LUNCHEONETTE	DINER	STEAK HOUSE	OTHER
TOTAL RESPONDENTS	509	105	398	163	344	147	359	73	229	9	15	16	4	12
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED_TYPE														
REGULARLY	89	20	69	26	63	22	67	16	44	-	2	-	2	3
	17.5	19.0	17.3	16.0	18.3	15.0	18.7	21.9	19.2	-	13.3	-	50.0	25.0
OCCASIONALLY	210	49	158	67	142	60	148	30	100	6	6	3	1	2
	41.3	46.7	39.7	41.1	41.3	40.8	41.2	41.1	43.7	66.7	40.0	18.8	25.0	16.7
NOT AT ALL	205	35	167	68	136	65	139	26	82	3	6	13	1	7
	40.3	33.3	42.0	41.7	39.5	44.2	38.7	35.6	35.8	33.3	40.0	81.3	25.0	58.3
DON'T KNOW	5	1	4	2	3	-	5	1	3	-	1	-	-	-
	1.0	1.0	1.0	1.2	0.9	-	1.4	1.4	1.3	-	6.7	-	-	-

Q.1 FOR EACH OF THE FOLLOWING (*) TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
(*) 1. HANDOUTS OR FLYERS.
BASED ON TOTAL.

		WEEKDAY MEALS OPEN					AVERAGE DAILY CUSTOMER COUNT			AVERAGE COST PER PERSON PER EVENING MEAL			AVERAGE YEARLY FOOD PURCHASE		
	TOTAL	1 OR 2 MEALS	ALL MEALS	BREAK-FAST	LUNCH	DINNER	UNDER 200	200-399	400 OR MORE	UNDER $5.00	$5.00-$7.99	$8.00 OR MORE	UNDER $50K	$50K-$99.9K	$100K AND OVER
TOTAL RESPONDENTS	509	339	170	218	481	448	186	216	70	137	149	140	80	136	173
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED_TYPE															
REGULARLY	74	57	17	25	72	63	22	37	13	24	20	18	13	22	25
	14.5	16.8	10.0	11.5	15.0	14.1	11.8	17.1	18.6	17.5	13.4	12.9	16.3	16.2	14.5
OCCASIONALLY	138	98	40	57	135	118	53	60	18	33	44	34	26	31	50
	27.1	28.9	23.5	26.1	28.1	26.3	28.5	27.8	25.7	24.1	29.5	24.3	32.5	22.8	28.9
NOT AT ALL	291	180	111	133	268	262	109	116	38	79	83	86	40	80	96
	57.2	53.1	65.3	61.0	55.7	58.5	58.6	53.7	54.3	57.7	55.7	61.4	50.0	58.8	55.5
DON'T KNOW	6	4	2	3	6	5	2	3	1	1	2	2	1	3	2
	1.2	1.2	1.2	1.4	1.2	1.1	1.1	1.4	1.4	0.7	1.3	1.4	1.3	2.2	1.2

THE GALLUP ORGANIZATION, INC.
PRINCETON, NEW JERSEY

RESTAURANT OMNIBUS
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OCTOBER, 1987
GO 87264

Q.1 FOR EACH OF THE FOLLOWING (9) TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
(C) 1. HANDOUTS OR FLYERS.
BASED ON TOTAL.

		RESTAURANT OWNERSHIP		TYPE OF MENU		TYPE OF RESTAURANT		DESCRIPTION OF NON-FAST FOOD RESTAURANT						
	TOTAL	CHAIN/ FRANCHISED INDEP.	INDEPENDENT	LIMITED	FULL	FAST FOOD	NON-FAST FOOD	FINE DINING	FAMILY	CAFETERIA	COFFEE SHOP/ LUNCHEONETTE	DINER	STEAK HOUSE	OTHER
TOTAL RESPONDENTS	509	105	398	163	344	147	359	73	229	9	15	16	4	12
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED_TYPE														
REGULARLY	74	29	44	33	41	33	41	8	24	2	4	-	-	3
	14.5	27.6	11.1	20.2	11.9	22.4	11.4	11.0	10.5	22.2	26.7	-	-	25.0
OCCASIONALLY	138	37	100	49	89	46	92	20	56	5	3	6	1	1
	27.1	35.2	25.1	30.1	25.9	31.3	25.6	27.4	24.5	55.6	20.0	37.5	25.0	8.3
NOT AT ALL	291	38	249	79	210	68	220	44	145	2	7	10	3	8
~	57.2	36.2	62.6	48.5	61.0	46.3	61.3	60.3	63.3	22.2	46.7	62.5	75.0	66.7
DON'T KNOW	6	1	5	2	4	-	6	1	4	-	1	-	-	-
	1.2	1.0	1.3	1.2	1.2	-	1.7	1.4	1.7	-	6.7	-	-	-

Q.1 FOR EACH OF THE FOLLOWING (#) TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
(#) J. DIRECT MAIL.
BASED ON TOTAL.

		WEEKDAY MEALS OPEN					AVERAGE DAILY CUSTOMER COUNT			AVERAGE COST PER PERSON PER EVENING MEAL			AVERAGE YEARLY FOOD PURCHASE		
	TOTAL	1 OR 2 MEALS	ALL MEALS	BREAK-FAST	LUNCH	DINNER	UNDER 200	200-399	400 OR MORE	UNDER $5.00	$5.00-$7.99	$8.00 OR MORE	UNDER $50K	$50K-$99.9K	$100K AND OVER
TOTAL RESPONDENTS	509	339	170	218	481	448	186	216	70	137	149	140	80	136	173
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED_TYPE															
REGULARLY	42	30	12	14	42	38	10	24	6	10	14	12	4	15	17
	8.3	8.8	7.1	6.4	8.7	8.5	5.4	11.1	8.6	7.3	9.4	8.6	5.0	11.0	9.8
OCCASIONALLY	81	59	22	24	76	75	21	44	14	22	19	33	9	21	39
	15.9	17.4	12.9	11.0	15.8	16.7	11.3	20.4	20.0	16.1	12.8	23.6	11.3	15.4	22.5
NOT AT ALL	380	246	134	177	357	330	152	146	49	105	112	94	66	99	114
	74.7	72.6	78.8	81.2	74.2	73.7	81.7	67.6	70.0	76.6	75.2	67.1	82.5	72.8	65.9
DON'T KNOW	6	4	2	3	6	5	3	2	1	-	4	1	1	1	3
	1.2	1.2	1.2	1.4	1.2	1.1	1.6	0.9	1.4	-	2.7	0.7	1.3	0.7	1.7

Q.1 FOR EACH OF THE FOLLOWING (**) TYPES OF ADVERTISING PLEASE TELL ME IF YOU USED THAT TYPE IN 1987.
(**) J. DIRECT MAIL.
BASED ON TOTAL.

		RESTAURANT OWNERSHIP		TYPE OF MENU		TYPE OF RESTAURANT		DESCRIPTION OF NON-FAST FOOD RESTAURANT						
	TOTAL	CHAIN/ FRANCHISED INDEPEND.	INDEPENDENT	LIMITED	FULL	FAST FOOD	NON-FAST FOOD	FINE DINING	FAMILY	CAFETERIA	COFFEE SHOP/ LUNCHEONETTE	DINER	STEAK HOUSE	OTHER
TOTAL RESPONDENTS	509	105	399	163	344	147	359	73	229	9	15	16	4	12
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
USED TYPE														
REGULARLY	42	20	20	20	22	19	23	6	13	-	2	-	1	1
	8.3	19.0	5.0	12.3	6.4	12.9	6.4	8.2	5.7	-	13.3	-	25.0	8.3
OCCASIONALLY	81	28	53	21	60	26	54	17	27	4	1	2	1	2
	15.9	26.7	13.3	12.9	17.4	17.7	15.0	23.3	11.8	44.4	6.7	12.5	25.0	16.7
NOT AT ALL	380	56	320	119	259	101	277	49	186	5	11	14	2	9
	74.7	53.3	80.4	73.0	75.3	68.7	77.2	67.1	81.2	55.6	73.3	87.5	50.0	75.0
DON'T KNOW	6	1	5	3	3	1	5	1	3	-	1	-	-	-
	1.2	1.0	1.3	1.8	0.9	0.7	1.4	1.4	1.3	-	6.7	-	-	-

Q.2 IN WHAT FORMAT WAS THE DIRECT MAIL?
BASED ON THOSE WHO USE DIRECT MAIL ADVERTISING.

		WEEKDAY MEALS OPEN				AVERAGE DAILY CUSTOMER COUNT			AVERAGE COST PER PERSON PER EVENING MEAL			AVERAGE YEARLY FOOD PURCHASE		
	TOTAL	1 OR 2 MEALS	ALL MEALS	BREAK-FAST	LUNCH	DINNER	UNDER 200	200-399	400 OR MORE	UNDER $5.00	$5.00-$7.99	$8.00 OR MORE	UNDER $50K	$50K-$99.9K	$100K AND OVER
TOTAL RESPONDENTS	123	89	34	38	118	113	31	68	20	32	33	45	13	36	56
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
FORMAT															
COUPON OR DISCOUNT	79	57	22	22	78	74	20	38	17	26	22	23	8	25	33
	64.2	64.0	64.7	57.9	66.1	65.5	64.5	55.9	85.0	81.3	66.7	51.1	61.5	69.4	58.9
CO-OP OR VALUE PACK	24	19	5	5	23	23	4	13	6	7	10	5	2	6	11
	19.5	21.3	14.7	13.2	19.5	20.4	12.9	19.1	30.0	21.9	30.3	11.1	15.4	16.7	19.6
MINI-MENU	18	16	2	3	18	17	8	6	3	2	5	10	3	3	7
	14.6	18.0	5.9	7.9	15.3	15.0	25.8	8.8	15.0	6.3	15.2	22.2	23.1	8.3	12.5
CALENDAR OF EVENTS OR SPECIALS	17	13	4	4	15	17	5	9	3	3	2	11	1	3	12
	13.8	14.6	11.8	10.5	12.7	15.0	16.1	13.2	15.0	9.4	6.1	24.4	7.7	8.3	21.4
GIVEAWAY	13	8	5	5	13	12	4	5	2	1	6	3	1	3	6
	10.6	9.0	14.7	13.2	11.0	10.6	12.9	7.4	10.0	3.1	18.2	6.7	7.7	8.3	10.7
LETTER	11	5	6	7	11	10	5	4	2	1	2	7	-	3	8
	8.9	5.6	17.6	18.4	9.3	8.8	16.1	5.9	10.0	3.1	6.1	15.6	-	8.3	14.3
INVITATION	11	8	3	4	10	11	2	7	2	1	3	7	-	3	8
	8.9	9.0	8.8	10.5	8.5	9.7	6.5	10.3	10.0	3.1	9.1	15.6	-	8.3	14.3
NEWSLETTER	9	5	4	6	8	7	2	7	-	-	1	6	-	3	5
	7.3	5.6	11.8	15.8	6.8	6.2	6.5	10.3	-	-	3.0	13.3	-	8.3	8.9
POSTCARD	1	1	-	-	1	1	-	-	1	1	-	-	-	-	1
	0.8	1.1	-	-	0.8	0.9	-	-	5.0	3.1	-	-	-	-	1.8
OTHER	6	5	1	1	6	5	3	3	-	-	2	3	-	-	6
	4.9	5.6	2.9	2.6	5.1	4.4	9.7	4.4	-	-	6.1	6.7	-	-	10.7
DON'T KNOW	2	2	-	-	2	2	-	2	-	-	1	1	-	-	1
	1.6	2.2	-	-	1.7	1.8	-	2.9	-	-	3.0	2.2	-	-	1.8

Q.2 IN WHAT FORMAT WAS THE DIRECT MAIL?
BASED ON THOSE WHO USE DIRECT MAIL ADVERTISING.

		RESTAURANT OWNERSHIP		TYPE OF MENU		TYPE OF RESTAURANT		DESCRIPTION OF NON-FAST FOOD RESTAURANT						
	TOTAL	CHAIN/ FRANCHISED INDEPEND.	INDEPENDENT	LIMITED	FULL	FAST FOOD	NON-FAST FOOD	FINE DINING	FAMILY	CAFETERIA	COFFEE SHOP/ LUNCHEONETTE	DINER	STEAK HOUSE	OTHER
TOTAL RESPONDENTS	123 100.0	48 100.0	73 100.0	41 100.0	82 100.0	45 100.0	77 100.0	23 100.0	40 100.0	4 100.0	3 100.0	2 100.0	2 100.0	3 100.0
FORMAT														
COUPON OR DISCOUNT	79 64.2	41 85.4	38 52.1	34 82.9	45 54.9	38 84.4	41 53.2	9 39.1	26 65.0	2 50.0	- -	1 50.0	1 50.0	2 66.7
CO-OP OR VALUE PACK	24 19.5	16 33.3	8 11.0	13 31.7	11 13.4	11 24.4	13 16.9	2 8.7	9 22.5	1 25.0	- -	- -	1 50.0	- -
MINI-MENU	18 14.6	3 6.3	15 20.5	2 4.9	16 19.5	1 2.2	17 22.1	4 17.4	11 27.5	1 25.0	1 33.3	- -	- -	- -
CALENDAR OF EVENTS OR SPECIALS	17 13.8	6 12.5	11 15.1	2 4.9	15 18.3	4 8.9	13 16.9	6 26.1	4 10.0	1 25.0	- -	1 50.0	1 50.0	- -
GIVEAWAY	13 10.6	8 16.7	5 6.8	6 14.6	7 8.5	4 8.9	9 11.7	1 4.3	6 15.0	- -	1 33.3	- -	1 50.0	- -
LETTER	11 8.9	2 4.2	8 11.0	- -	11 13.4	- -	11 14.3	7 30.4	2 5.0	- -	1 33.3	- -	- -	1 33.3
INVITATION	11 8.9	2 4.2	9 12.3	1 2.4	10 12.2	1 2.2	10 13.0	6 26.1	4 10.0	- -	- -	- -	- -	- -
NEWSLETTER	9 7.3	2 4.2	6 8.2	2 4.9	7 8.5	2 4.4	7 9.1	5 21.7	1 2.5	- -	- -	1 50.0	- -	- -
POSTCARD	1 0.8	1 2.1	- -	1 2.4	- -	1 2.2	- -	- -	- -	- -	- -	- -	- -	- -
OTHER	6 4.9	1 2.1	5 6.8	2 4.9	4 4.9	1 2.2	4 5.2	2 8.7	1 2.5	1 25.0	- -	- -	- -	- -
DON'T KNOW	2 1.6	- -	2 2.7	- -	2 2.4	- -	2 2.6	1 4.3	1 2.5	- -	- -	- -	- -	- -

Q.3 WHICH OF THE FOLLOWING SOURCES OF MAILING LISTS DO YOU USE?
BASED ON THOSE WHO USE DIRECT MAIL ADVERTISING.

		WEEKDAY MEALS OPEN				AVERAGE DAILY CUSTOMER COUNT			AVERAGE COST PER PERSON PER EVENING MEAL			AVERAGE YEARLY FOOD PURCHASE		
	TOTAL	1 OR 2 MEALS	ALL MEALS	BREAK-FAST	LUNCH	DINNER	UNDER 200	200-399	400 OR MORE	UNDER $5.00	$5.00-$7.99	$8.00 OR MORE	UNDER $50K	$50K-$99.9K	$100K AND OVER
TOTAL RESPONDENTS	123	89	34	38	118	113	31	68	20	32	33	45	13	36	56
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
CURRENT PATRONS															
YES	39	24	15	17	36	33	14	20	3	3	8	21	3	9	22
	31.7	27.0	44.1	44.7	30.5	29.2	45.2	29.4	15.0	9.4	24.2	46.7	23.1	25.0	39.3
NO	51	40	11	13	50	48	11	27	12	16	17	13	7	15	21
	41.5	44.9	32.4	34.2	42.4	42.5	35.5	39.7	60.0	50.0	51.5	28.9	53.8	41.7	37.5
DON'T KNOW	33	25	8	8	32	32	6	21	5	13	8	11	3	12	13
	26.8	28.1	23.5	21.1	27.1	28.3	19.4	30.9	25.0	40.6	24.2	24.4	23.1	33.3	23.2
PURCHASED LIST															
YES	36	27	9	11	35	33	9	18	9	14	7	11	6	12	15
	29.3	30.3	26.5	28.9	29.7	29.2	29.0	26.5	45.0	43.8	21.2	24.4	46.2	33.3	26.8
NO	57	39	18	20	54	51	16	31	7	7	19	23	5	15	26
	46.3	43.8	52.9	52.6	45.8	45.1	51.6	45.6	35.0	21.9	57.6	51.1	38.5	41.7	46.4
DON'T KNOW	30	23	7	7	29	29	6	19	4	11	7	11	2	9	15
	24.4	25.8	20.6	18.4	24.6	25.7	19.4	27.9	20.0	34.4	21.2	24.4	15.4	25.0	26.8
ANY OTHER SOURCES															
YES	38	26	12	13	36	36	9	22	6	10	14	11	3	10	16
	30.9	29.2	35.3	34.2	30.5	31.9	29.0	32.4	30.0	31.3	42.4	24.4	23.1	27.8	28.6
NO	45	32	13	16	42	40	13	23	6	9	11	19	6	13	20
	36.6	36.0	38.2	42.1	35.6	35.4	41.9	33.8	30.0	28.1	33.3	42.2	46.2	36.1	35.7
DON'T KNOW	40	31	9	9	40	37	9	23	8	13	8	15	4	13	20
	32.5	34.8	26.5	23.7	33.9	32.7	29.0	33.8	40.0	40.6	24.2	33.3	30.8	36.1	35.7

Q.9 WHICH OF THE FOLLOWING SOURCES OF MAILING LISTS DO YOU USE?
BASED ON THOSE WHO USE DIRECT MAIL ADVERTISING.

	TOTAL	RESTAURANT OWNERSHIP: CHAIN/ FRANCHISED INDEPEND.	RESTAURANT OWNERSHIP: INDEPENDENT	TYPE OF MENU: LIMITED	TYPE OF MENU: FULL	TYPE OF RESTAURANT: FAST FOOD	TYPE OF RESTAURANT: NON-FAST FOOD	DESCRIPTION OF NON-FAST FOOD RESTAURANT: FINE DINING	FAMILY	CAFETERIA	COFFEE SHOP/ LUNCHEONETTE	DINER	STEAK HOUSE	OTHER
TOTAL RESPONDENTS	123	48	73	41	82	45	77	23	40	4	3	2	2	3
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
CURRENT PATRONS														
YES	39	10	28	7	32	9	29	16	8	1	2	1	1	-
	31.7	20.8	38.4	17.1	39.0	20.0	37.7	69.6	20.0	25.0	66.7	50.0	50.0	-
NO	51	24	26	21	30	22	29	4	21	1	1	-	1	1
	41.5	50.0	35.6	51.2	36.6	48.9	37.7	17.4	52.5	25.0	33.3	-	50.0	33.3
DON'T KNOW	33	14	19	13	20	14	19	3	11	2	-	1	-	2
	26.8	29.2	26.0	31.7	24.4	31.1	24.7	13.0	27.5	50.0	-	50.0	-	66.7
PURCHASED LIST														
YES	36	17	19	16	20	15	20	6	10	1	1	-	1	1
	29.3	35.4	26.0	39.0	24.4	33.3	26.0	26.1	25.0	25.0	33.3	-	50.0	33.3
NO	57	21	34	15	42	19	38	13	20	1	2	1	1	-
	46.3	43.8	46.6	36.6	51.2	42.2	49.4	56.5	50.0	25.0	66.7	50.0	50.0	-
DON'T KNOW	30	10	20	10	20	11	19	4	10	2	-	1	-	2
	24.4	20.8	27.4	24.4	24.4	24.4	24.7	17.4	25.0	50.0	-	50.0	-	66.7
ANY OTHER SOURCES														
YES	38	14	22	12	26	14	24	4	18	-	-	-	-	2
	30.9	29.2	30.1	29.3	31.7	31.1	31.2	17.4	45.0	-	-	-	-	66.7
NO	45	13	32	11	34	13	31	13	11	2	3	1	1	-
	36.6	27.1	43.8	26.8	41.5	28.9	40.3	56.5	27.5	50.0	100.0	50.0	50.0	-
DON'T KNOW	40	21	19	18	22	18	22	6	11	2	-	1	1	1
	32.5	43.8	26.0	43.9	26.8	40.0	28.6	26.1	27.5	50.0	-	50.0	50.0	33.3

Q.4 WHAT PERCENT CHANGE DO YOU EXPECT IN YOUR BUDGET FOR ADVERTISING AND PROMOTIONS IN 1988? BASED ON TOTAL.

		WEEKDAY MEALS OPEN					AVERAGE DAILY CUSTOMER COUNT			AVERAGE COST PER PERSON PER EVENING MEAL			AVERAGE YEARLY FOOD PURCHASE		
	TOTAL	1 OR 2 MEALS	ALL MEALS	BREAK-FAST	LUNCH	DINNER	UNDER 200	200-399	400 OR MORE	UNDER $5.00	$5.00-$7.99	$8.00 OR MORE	UNDER $50K	$50K-$99.9K	$100K AND OVER
TOTAL RESPONDENTS	509	339	170	218	481	448	186	216	70	137	149	140	80	136	173
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
REGION															
INCREASE UP TO 5 PERCENT	65	48	17	23	60	59	25	24	13	17	24	16	15	20	19
	12.8	14.2	10.0	10.6	12.5	13.2	13.4	11.1	18.6	12.4	16.1	11.4	18.8	14.7	11.0
INCREASE 6 TO 10 PERCENT	36	26	10	14	35	31	10	20	4	10	10	10	6	11	11
	7.1	7.7	5.9	6.4	7.3	6.9	5.4	9.3	5.7	7.3	6.7	7.1	7.5	8.1	6.4
INCREASE MORE THAN 10 PERCENT	27	17	10	11	25	25	12	12	3	5	7	12	7	7	9
	5.3	5.0	5.9	5.0	5.2	5.6	6.5	5.6	4.3	3.6	4.7	8.6	8.8	5.1	5.2
DECREASE UP TO 5 PERCENT	10	8	2	3	10	9	4	4	2	3	1	5	-	4	5
	2.0	2.4	1.2	1.4	2.1	2.0	2.2	1.9	2.9	2.2	0.7	3.6	-	2.9	2.9
DECREASE MORE THAN 5 PERCENT	12	7	5	5	11	9	2	6	3	2	2	5	1	5	5
	2.4	2.1	2.9	2.3	2.3	2.0	1.1	2.8	4.3	1.5	1.3	3.6	1.3	3.7	2.9
NO CHANGE/STAY THE SAME	295	192	103	135	278	256	108	129	37	80	90	72	44	78	110
	58.0	56.6	60.6	61.9	57.8	57.1	58.1	59.7	52.9	58.4	60.4	51.4	55.0	57.4	63.6
DON'T KNOW	64	41	23	27	62	59	25	21	8	20	15	20	7	11	14
	12.6	12.1	13.5	12.4	12.9	13.2	13.4	9.7	11.4	14.6	10.1	14.3	8.8	8.1	8.1

Q.4 WHAT PERCENT CHANGE DO YOU EXPECT IN YOUR BUDGET FOR ADVERTISING AND PROMOTIONS IN 1988? BASED ON TOTAL.

		RESTAURANT OWNERSHIP		TYPE OF MENU		TYPE OF RESTAURANT		DESCRIPTION OF NON-FAST FOOD RESTAURANT						
	TOTAL	CHAIN/ FRANCHISED INDEPEND.	INDEPENDENT	LIMITED	FULL	FAST FOOD	NON-FAST FOOD	FINE DINING	FAMILY	CAFETERIA	COFFEE SHOP/ LUNCHEONETTE	DINER	STEAK HOUSE	OTHER
TOTAL RESPONDENTS	509	105	398	163	344	147	359	73	229	9	15	16	4	12
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
PERCENT														
INCREASE UP TO 5 PERCENT	65	21	44	16	49	21	44	8	31	1	3	-	1	-
	12.8	20.0	11.1	9.8	14.2	14.3	12.3	11.0	13.5	11.1	20.0	-	25.0	-
INCREASE 6 TO 10 PERCENT	36	14	22	16	20	14	22	4	14	-	2	-	-	2
	7.1	13.3	5.5	9.8	5.8	9.5	6.1	5.5	6.1	-	13.3	-	-	16.7
INCREASE MORE THAN 10 PERCENT	27	8	19	8	19	8	18	7	8	2	-	1	-	-
	5.3	7.6	4.8	4.9	5.5	5.4	5.0	9.6	3.5	22.2	-	6.3	-	-
DECREASE UP TO 5 PERCENT	10	1	9	2	8	3	7	3	4	-	-	-	-	-
	2.0	1.0	2.3	1.2	2.3	2.0	1.9	4.1	1.7	-	-	-	-	-
DECREASE MORE THAN 5 PERCENT	12	-	12	4	8	2	10	3	7	-	-	-	-	-
	2.4	-	3.0	2.5	2.3	1.4	2.8	4.1	3.1	-	-	-	-	-
NO CHANGE/STAY THE SAME	295	43	250	95	198	75	218	41	138	5	9	14	2	8
	58.0	41.0	62.8	58.3	57.6	51.0	60.7	56.2	60.3	55.6	60.0	87.5	50.0	66.7
DON'T KNOW	64	18	42	22	42	24	40	7	27	1	1	1	1	2
	12.6	17.1	10.6	13.5	12.2	16.3	11.1	9.6	11.8	11.1	6.7	6.3	25.0	16.7

COMPOSITION OF THE SAMPLE

COMPOSITION OF THE SAMPLE
- BASED ON 509 RESTAURANTS -

	Total Sample %
Number of Weekday Meals Open	
One or two	66.6
Three	33.4
	100.0
Customer Count On An Average Day	
Under 200	36.5
200 - 399	42.4
400 or more	13.8
Undesignated	7.3
	100.0
Average Cost Per Person For Evening Meal	
Under $5.00	26.9
$5.00 - $7.99	29.3
$8.00 and over	27.5
Not open in the evening	12.0
Undesignated	4.3
	100.0
Average Yearly Food Purchases	
Under $50,000	15.7
$50,000 - $99,999	26.7
$100,000 and over	34.0
Haven't been open a year	1.0
Undesignated	22.6
	100.0

	Total Sample %
Type of Restaurant Ownership	
Chain owned/franchised independent	20.6
Independent	78.2
Undesignated	1.2
	100.0
Type of Menu	
Limited	32.0
Full	67.6
Undesignated	0.4
	100.0
Type of Restaurant	
Fast Food	28.9
Non-Fast Food	70.5
Undesignated	0.6
	100.0
Description of Non-Fast Food Restaurant	
Fine dining restaurant	20.3
Family restaurant	63.8
Cafeteria	2.5
Coffee shop/luncheonette	4.2
Diner	4.5
Steak house	1.1
Other	3.3
Undesignated	0.3
	100.0

QUESTIONNAIRE

1. I am going to read you several types of advertising you may or may not have used for your restaurant in 1987. For each type of advertising I read please tell me if you used that type regularly, occasionally or not at all in 1987. **(READ EACH; START AT X)**

		Regularly	Occasionally	Not At All	Don't Know
	a. radio	1[ ]	2[ ]	3[ ]	y[ ]
	b. newspaper	1[ ]	2[ ]	3[ ]	y[ ]
	c. TV	1[ ]	2[ ]	3[ ]	y[ ]
	d. restaurant guide	1[ ]	2[ ]	3[ ]	y[ ]
X	e. magazine	1[ ]	2[ ]	3[ ]	y[ ]
	f. billboard or outdoor advertising	1[ ]	2[ ]	3[ ]	y[ ]
	g. sponsorship of a team	1[ ]	2[ ]	3[ ]	y[ ]
	h. sponsorship of a community event	1[ ]	2[ ]	3[ ]	y[ ]
	i. handouts or flyers	1[ ]	2[ ]	3[ ]	y[ ]
	j. direct mail	1[ ]	2[ ]	3[ ]	y[ ]

IF USED DIRECT MAIL (1 OR 2 IN Q. 1j) ASK Q. 2 AND 3.
OTHERS GO TO Q. 4.

2. In what format was the direct mail? **(READ EACH; START AT X; CHECK ALL THAT APPLY)**

1[ ]Calendar of events or specials
X 2[ ]Coupon or discount
3[ ]Co-op or value pack
4[ ]Giveaway
5[ ]Invitation
6[ ]Letter
7[ ]Mini-menu
8[ ]Newsletter
9[ ]Postcard
x[ ]Other (specify)_____
y[ ]Don't know

3. Which of the following sources of mailing lists do you use? **(READ EACH)**

		Yes	No	Don't Know
a.	Current patrons	1[ ]	2[ ]	y[ ]
b.	Purchased list	1[ ]	2[ ]	y[ ]
c.	Any other sources (please specify)_____	1[ ]	2[ ]	y[ ]

_____

4. What percent change do you expect in your budget for advertising and promotions in 1988?

1[ ]Increase up to 5 percent

2[ ]Increase 6 to 10 percent

3[ ]Increase more than 10 percent

4[ ]Decrease up to 5 percent

5[ ]Decrease more than 5 percent

0[ ]No change/Stay the same

y[ ]Don't know

And now, I would like to ask you just a few background questions about your restaurant . . .

1. Approximately, what is your customer count for an average day?

   1[ ]199 and under
   2[ ]200 - 299
   3[ ]300 - 399
   4[ ]400 & over
   y[ ]Don't know

2. What is the approximate dollar value per person of your average evening meal, not including charges for alcoholic beverages? **(DO NOT READ)**

   1[ ]$3.99 and under
   2[ ]$4.00 - $4.99
   3[ ]$5.00 - $5.99
   4[ ]$6.00 - $7.99
   5[ ]$8.00 - $8.99
   6[ ]$9.00 - $9.99
   7[ ]$10.00 and over
   8[ ]Not open in evening
   y[ ]Don't know

3. Approximately, how much do you spend on purchases of food in an average year? Is it: **(READ LIST)**

   1[ ]Under $50,000?
   2[ ]$50,000 - $99,999?
   3[ ]$100,000 - $200,000? or
   4[ ]Over $200,000?
   5[ ]Haven't been open a year **(DO NOT READ)**
   y[ ]Don't know **(DO NOT READ)**

4. Is this restaurant chain owned, is it franchised independent, or is it completely independent?

1[ ]Chain
2[ ]Franchised independent
3[ ]Independent
y[ ]Don't know

5. Do you have a limited menu or a full menu?

1[ ]Limited
2[ ]Full

6. Is this a fast food restaurant?

1[ ]Yes - **GO TO Q. 8**
2[ ]No - **ASK Q. 7**

7. I am going to read a list which describes types of restaurants. Please tell me which <u>one</u> of these <u>best</u> describes your restaurant. Is your restaurant a fine dining restaurant, a family restaurant, a cafeteria, a coffee shop or luncheonette, a diner or is it a steak house? **(ACCEPT ONLY ONE ANSWER)**

1[ ]Fine dining restaurant
2[ ]Family restaurant
3[ ]Cafeteria
4[ ]Coffee shop/luncheonette
5[ ]Diner
6[ ]Steak house
x[ ]Other (specify)_____

8. What is your title or position in your organization?

1[ ]Assistant manager
2[ ]Chef
3[ ]Manager
4[ ]Owner
5[ ]President
6[ ]Purchasing agent
x[ ]Other (specify)_____
y[ ]Undesignated